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Northern Travellers' Profile

Executive Summary

Prepared for:
Ontario Ministry of Economic Development, Trade and Tourism under the Federal/Provincial Northern Ontario Development Agreement (NODA)

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Executive Summary

Foreword

Ontario's North . . . loons, lakes, forests, towns, cities . . . is the destination for thousands of Canadians, Americans and Overseas visitors to Canada. Who are these visitors? What do they do while in Northern Ontario? Is the Northern Ontario's visitor similar to or different from the visitor to the province's southern regions? To other parts of Canada's North? What are the best opportunities for developing and marketing tourism in Northern Ontario?

To answer these questions, the Ontario Ministry of Economic Development, Trade and Tourism, through the Federal/Provincial Northern Ontario Development Agreement (NODA) commissioned Research Resolutions to undertake the *Northern Travellers' Profile*. Part II of the project, reported here, relies on special tabulations of Statistics Canada's 1994 Canadian Travel Survey (CTS) and 1994 International Travel Survey (ITS) to describe Ontario's Northern Visitor.[1]

Which visitors?

Domestic and American visitors to Northern Ontario, Southern Ontario, Canada's Northeast and Northwest[2] are described here. The small sample size for Overseas visitors to Northern Ontario makes it impossible to provide details about these visitors.

This report covers *only* overnight household or party *trips* with a *main destination* in one of the following six regions: Northern Ontario, Southern Ontario, Northeastern Canada, Southeastern Canada, Northwestern Canada or Southwestern Canada. Because some trips do not have an identifiable *main destination* and because the unit is the whole trip (household trip/party trip) rather than the *person trip* or *visit*, figures shown throughout this report are smaller than the reader might have seen in other documents produced by MEDTT or Statistics Canada, using the same two studies (ITS, CTS).

For convenience, the terms "visitors" and "trips" are commonly used throughout this report. In all cases, they refer to the whole trip — by a Canadian *household* or an American *travel party*.

What seasons?

Most comments in this summary refer to the *peak* season. This "peak"

— the six month period from April through September — covers a broader expanse of time than most northern operators would use to describe their prime tourist season. The six month period was used for a variety of reasons (see Notes).[3]

Many comments also refer to *Northern Ontario* as if it were a single, homogeneous *destination*. It is not. As described in this report, there are dramatic differences in the visitor mix of the six tourism regions and in their activity profiles.

What information is in this report?

The extent to which visitors to a region utilize, patronize and experience the natural and built environment is central to understanding the social, cultural, environmental and economic impacts of tourism. In this summary, key characteristics that describe Northern Ontario's peak season visitors from Canada and the USA are described. It also provides information on the salient similarities and differences between Northern Ontario's overnight visitors and those who go to other regions of Canada's North. Topics such as the following are covered:

- Who takes an overnight trip to Northern Ontario?
- What are they doing on the trip?
- What prompted them to visit Northern Ontario?
- Where are they spending their nights — are they using hotels, motels, commercial cottages/cabins or campgrounds, the homes of their friends or their own private cottages?
- Do they go to the cottage with a box of groceries bought at home, and sit by their docks instead of using the recreational and retail establishments in the area?
- Apart from fishing, what interests an Angler? Is the Canadian Angler different from the American Angler?
- Where can Northern Ontario tourism operators maximize the chances of finding buyers for the services and tourism experiences they offer?

What other information is available?

This document encapsulates information that is provided in considerable depth in companion volumes.[4] For further detail at the regional and aggregate levels, the reader is directed to the *Detailed Findings* — a comprehensive analysis of domestic and USA visitors to Northern Ontario, including a section on Overseas visitors. A

Technical Appendix is also available for those interested in more extensive discussion of decisions and definitions used by Research Resolutions to explore the Statistics Canada's 1994 Canadian Travel Survey, and 1994 International Travel Survey (USA and Overseas Files).

Special thanks are due to Statistics Canada and The Ontario Ministry of Economic Development, Trade and Tourism, Tourism Policy Branch for making data sources available for this analysis, to the administrators of the Canada-Northern Ontario Development Agreement (NODA), and, of course to the federal and provincial governments for their funding support.

Toronto, Ontario May, 1996

1994 Tourism Flows In Northern Ontario

Canada's Three Northern Regions

Northern Ontario supports more than 2 million overnight trips.

In 1994, more than two million overnight trips by Canadians, about one-quarter million American and about 16,000 overnight trips by visitors from overseas had a main destination in Northern Ontario.[4]

Almost 9-in-10 overnight trips to a destination in Northern Ontario are made by Canadians.

While the importance USA and overseas tourism is undeniable, particularly for certain niche markets and products in Northern Ontario, these non-domestic markets are dramatically smaller than the *home grown* Canadian market for the region.

Table 1

Overnight Trips				
	To Canada's North[5]		To Northern Ontario	
	6,079,000		2,394,000	
From . . .	#	%	#	%
Canada	5,589,000	92	2,105,000	88
USA	440,000	7	273,000	11
Overseas	50,000	1	16,000	1

The unit reported here is a party (ITS) or household (CTS) trip, irrespective of the number of people on the trip.[6]

The small size of the overseas market, its language and cultural diversity, and the corresponding costs and complexities of marketing to it make it considerably less promising than the much larger American and Canadian markets for most tourism businesses in Northern Ontario. Small sample sizes for Northern Ontario's

overseas visitors explain why this market sector is not covered in this report.

Northern Ontario is a summer destination, particularly for Americans.

About one-half of *all* overnight trips taken to Northern Ontario are made in July, August or September, although Canadians are more apt to venture into the north at other times of the year than are Americans.

Two-thirds of the Canadian visitation to the region takes place in the *peak season* (April through September).

Table 2

Timing Of Trips To Northern Ontario		
	Trips By Canadians	Trips By Americans
	2,105,000	273,000
	%	%
Quarter I	18	10
Quarter II	20	27
Quarter III	45	56
Quarter IV	17	7
Peak Season	65	83
Shoulder/ Winter	35	17

Figures may not add to 100% due to rounding. Overnight Household/Party Trips.[7]

In contrast, more than three-quarters of American trips to Northern Ontario take place between April and September (83%).

Business activity and climate explain why Northern Ontario's tourism season is concentrated in "fair weather" periods.

Northern Ontario obtains almost one-half of its annual overnight Canadian tourism in July, August and September (45%), and more than half of its American visitors during this time period (56%). Southern Ontario, on the other hand, receives only about one-third of its domestic and American visitors in this three month span.

The broader seasonal spread enjoyed by Southern Ontario is likely a result of the greater intensity of business trips by Americans and Canadians and family visits by Canadians — trips that are not as weather-dependent as vacation trips. Southern Ontario also offers a range of indoor attractions such as museums, galleries, and cultural performances that are comparatively immune from weather.

Table 3

Timing Of Trips To Various Regions				
		QIII	Peak QII + QIII	Shoulder/ Winter QI + QIV
Canadians To . .				
Northern Ontario	%	45	65	35
Southern Ontario	%	35	60	40
Northeastern Canada	%	37	59	41
Northwestern Canada	%	33	58	42
Americans To . .				
Northern Ontario	%	56	83	17
Southern Ontario	%	39	67	33
Northeastern Canada	%	69	89	11
Northwestern Canada	%	57	85	15

Figures may not add to 100% due to rounding. Overnight Household/Party Trips

The availability of all-season attractions and business opportunities seems to be particularly important in the USA market. One-third of the Americans who go to Southern Ontario over the year do so during the Shoulder/Winter season (33%). In contrast, fewer than one-fifth of Americans going to Northern Ontario elect to do so between October and March (17%).

Business travel by Canadians to Northwestern Canada smoothes out the seasonal flows for this region.

More domestic tourism to Northern Ontario is concentrated in July, August and September than is evident for Northeastern Canada and Northwestern Canada. The lower "peak" experienced in the northern areas to the east and particularly the west of Ontario is largely a function of the high proportion of non-pleasure trips into these other northern regions.

Americans' seasonal travel patterns for Northern Ontario and Northwestern Canada are quite similar. Those going to Northeastern Canada, however, are most heavily concentrated in the third quarter.

Ontario is the biggest market for Northern Ontario.

Ontario itself is the single largest source of overnight trips for Northern Ontario. The region draws more than one-third of its peak season tourism from within its own boundaries — that is, from residents of Northern Ontario. It attracts the same proportion from Ontarians who live in the southern portion of the province.

The region has relatively little drawing power from any other part of Canada, although 1-in-10 Canadian households from Manitoba cross over to Ontario's North for an overnight trip in the peak season. It should be noted that Winnipeg is located in the Southwestern Canada region for purposes of this project.

There is virtually no "cross-over" among the northern regions of Canada.

In view of the fact that there are few transportation corridors to facilitate travel from one northern part of Canada to another, it is not surprising that cross-over from one "North" to the next is essentially non-existent.

Other northern regions draw more heavily on their southern areas for Canadian visitors than does Northern Ontario.

Other northern regions in Canada do not draw as heavily on their northern residents for tourism as does Northern Ontario. Instead, Northeastern and Northwestern Canada draw considerably more heavily on their southern areas than is evident in

Northern Ontario. This north/south shift across the regions is not particularly surprising since Northern Ontario has many more major population centres *in the north* to supply tourism activity than does Northeastern or Northwestern Canada as defined in this project.

Table 4

Canadians' Travel Flows, Peak Season			
	Canadians To . . .		
	Northern Ontario	Northeastern Canada	Northwestern Canada
Canadians From . . .	%	%	%
Northern Ontario	45	1	*
Southern Ontario	42	1	1
Northeastern Canada	1	28	-
Southeastern Canada	2	69	1
Northwestern Canada	*	-	23
Southwestern Canada	10	*	74

*Less than 0.5%. Total overnight domestic trips with a main destination in each northern region during peak season.[8]

All northern regions draw on states that are relatively "close".

Each of the three major northern regions — Northern Ontario, Northeastern Canada and Northwestern Canada — draws its peak season American visitors from states that are in relatively close proximity.

- New England states are the major market for Canada's Northeastern region.
- Northern Ontario draws most of its American peak season visitation from East and West North Central states.
- Alaska, Pacific and Mountain states constitute the primary catchment area for Northwestern Canada. Nonetheless, this region attracts Americans from a variety of regions to a greater extent than does any other. In fact, it draws almost one-fifth of its market from Northern Ontario's key feeder areas: East and West North Central.

Table 5

Americans' Travel Flows, Peak Season			
	Americans To . . .		
	Northern Ontario	Northeastern Canada	Northwestern Canada
Americans From . . .	%	%	%
New England	2	62	2
Mid-Atlantic	9	22	8
South Atlantic	4	2	5
East North Central	57	4	10
West North Central	23	2	8
East South Central	2	3	2
West South Central	1	3	6
Mountain	2	-	13
Pacific	1	1	25
Alaska	-	-	21

*Less than 0.5%. Total overnight trips by Americans with a main destination in each northern region during peak season.[9]

Northern Ontario's USA market is largely restricted to four states: Michigan, Minnesota, Ohio, and Wisconsin.

In fact, these four states generate two-thirds (65%) of all overnight trips by Americans to Northern Ontario over the peak season, and almost one-tenth of the region's total visitation for the season — domestic, USA and overseas combined.

Table 6

Key Province & State Markets For Northern Ontario, Peak Season		
	1,603,000	
	#	%
Canada	1,365,000	85
Ontario	1,191,000	74
Northern	618,000	38
Southern	573,000	36
Manitoba	112,000	7
USA	227,000	14
Michigan	54,000	3
Minnesota	33,000	2
Ohio	32,000	2
Wisconsin	28,000	2
Other USA	80,000	5
Overseas	11,000	1
Total Overnight Trips, Peak Season (Canada, USA, Overseas)[10]		

Canadian cities are also major contributors to peak season tourism in Northern Ontario.

About 1-in-8 peak season overnight trips to the region are made by Toronto households, and 1-in-12 start from Thunder Bay — a city within the region. Sudbury and Winnipeg are also substantial sources of tourism in Northern Ontario.

Table 7

Key City Markets, Peak Season		
	1,603,000	
	#	%
Toronto	203,000	13
Sudbury	128,000	8
Thunder Bay	97,000	6
Winnipeg	90,000	6
Kitchener	57,000	4
London	42,000	3
Hamilton	39,000	2
Ottawa	29,000	2
Total Overnight Trips, Peak Season (Canada, USA, Overseas)[11]		

Ontario's Six Northern Areas

Feeder markets for each of the six Northern Ontario tourism regions reflect their location.

Before northern tourism operators ask why their "own" customer profile is so different from the one presented above, they should consider the extreme regionalization of markets for each Northern Ontario tourism region (OTAP). These regional markets, at the national, state and Canadian city level are explored below.

In essence, regions that share borders and easy access routes with the USA fare considerably better within the American market than do those that are more distant or harder to reach.

Table 8

% Of Trips From Major Markets, Peak Season			
	From . . .		
To . . .	Canada	USA	O'Seas
Near North	89%	10%	1%
Rainbow Country	95%	4%	1%
Algoma Country	64%	35%	1%
James Bay Frontier	96%	3%	1%
North of Superior	69%	28%	3%
Sunset Country	80%	20%	*

*Less than 0.5%. Special calculations.

Rainbow Country and James Bay Frontier — the two "interior" regions of Ontario's north, have particular success in attracting Canadians during the peak season.

In contrast, Algoma Country and North of Superior on the Michigan border, and Sunset Country, near Minnesota and Michigan, have special success in the USA market.

Table 9

% Of Trips From Key States, Peak Season					
	From . . .				
To . . .	Mich -igan	Ohio	Minn	Wis- consin	New York
Near North	3%	1%	*	*	3%
Rainbow Country	1%	1%	*	*	1%
Algoma Country	10%	11%	1%	4%	*
James Bay Frontier	1%	1%	*	*	*
North of Superior	12%	*	6%	4%	*
Sunset Country	*	*	6%	4%	*

*Less than 0.5%. Special calculations.

Michigan is considerably more important as a feeder state for Algoma Country and North of Superior than it is for any other part of Northern Ontario.

Algoma Country is also dependent on the Ohio market — and is the only region to draw heavily from these Americans.

The Canadian "city" markets for each region tell a similar story: the closer and a "city" is, the more valuable it seems to be to the region as a source of visitors.

For example, the two most "southern" regions — Near North and Rainbow Country — both draw heavily from Sudbury, but the biggest urban market for Rainbow Country is Metro Toronto.

Table 10

% Of Trips From Key Canadian Cities, Peak Season					
	From . . .				
To . . .	Sud- bury	Thun -der Bay	Win- nipeg	Tor- onto	Kitche -ner
Near North	15%	*	*	9%	10%
Rainbow Country	12%	2%	2%	22%	6%
Algoma Country	6%	3%	*	3%	2%
James Bay Frontier	10%	2%	2%	16%	1%
North of Superior	1%	26%	*	*	*
Sunset Country	*	8%	26%	15%	*

*Less than 0.5%. Special calculations.

Thunder Bay's region — North of Superior — draws more than one-quarter of its peak season overnight visitors from the municipality itself. Winnipeg, on the other hand, is the largest metropolitan area close to Sunset Country. This Manitoba city provides more than one-quarter of Sunset's peak season overnight trips.

The closeness of the feeder markets for different parts of Canada's North explains why Canadians travel comparatively short distances to reach their northern destinations (distance is not available for the USA market). The average one-way distance for Northern Ontario's peak season overnight Canadian visitor is 442 kms . . . about the same as Canada's Northeast (472 kms) and somewhat shorter than a trip headed to the Northwest (600 kms).[12]

Some Demographics of Peak Season Northern Ontario Visitors

More of a man's world . . .

More American men than women are on trips to Northern Ontario during the peak season. Almost 9-in-10 of American trips include at least one man, but fewer than 7-in-10 include at least one woman. A similar, though not as dramatic pattern is evident for Canadians.

An adult-only world . . .

Few Americans or Canadians who visit the north — be it Ontario's North, Canada's Northeast or Northwest — are accompanied by children. Most are travelling in adult[14] only parties. Canadians

Table 11

Gender & Age of Visitors To Northern Ontario, Peak Season

	Canadians Characteristics Of Respondent	Americans Incidence Of Any... On Trip
	%	%
Males	54	86
Females	46	64
Under 24 Years	12	30
25 - 44 Years	46	55
45 - 54 Years	21	34
55 Years or More	22	59

Interpret with caution because the figures represent different approaches to age/gender: USA data do not add to 100% because ages and gender of all people in the travel party are included.[13]

(24%) are more likely to bring children to the province's north than are Americans (15%), possibly because a considerably higher proportion of Canadian trips are *cottage* or *family* (VFR) trips.

The USA market is an older market in Northern Ontario.

In light of the low incidence of children in American travel parties to Northern Ontario, it is not surprising that these parties include more older people than do the corresponding Canadian trips. In fact, about 6-in-10 trips by Americans to Northern Ontario in peak season have at least one person who is 55 years of age or over.

Trips that bring Americans to Northern Ontario are more apt to include older people than are the corresponding trips to the *southern* part of the province (43%), and fall between the other northern regions of the country. About 4-in-10 American trips to Northeastern Canada include someone who is at least 55 years of age, and 7-in-10 trips to the Northwestern part of the country do so.

A middle-of-the-road world . . .

Socio-economic information is only available for Canadian visitors. Most domestic visitors to Northern Ontario fall within the "moderate income" and "moderate education" range. Fewer than 1-in-5 have graduated from university — a proportion that is considerably lower than the 1-in-4 university graduates who go to destinations in Southern Ontario during the peak season.

Income levels correspond, at least in part, to education levels: fewer Canadians who go to Northern Ontario during the peak season have household incomes of $80,000 or more (12%) than is the case among Canadians who visit Southern Ontario during the peak season (16%).

Northern Ontario peak season overnight visitors have more formal education and higher household incomes than do visitors to Canada's Northeast but they have a strong resemblance to Northwest visitors with respect to these socio-economic characteristics.

Some Key Differences Across Canada's North

Cottage country for Canadians, and vacation country for Americans.

Because they have more business to transact, more friends and relatives to see, and because they own vacation properties outside their urban environments, many Canadians use "their" North quite differently than do Americans. Only about 5-in-10 Canadians go to Northern Ontario on a *pleasure* trip compared to 8-in-10 Americans.

Table 12

% Of All Trips To . . . That Are Pleasure Trips, Peak Season		
	Canadians	Americans
To . . .	%	%
Northern Ontario	52	79
Northeastern Canada	50	80
Northwestern Canada	34	66

Main purpose of trip to each destination in peak season.[13]

These levels are similar to those for travel in Canada's Northeast, but the Northwest attracts lower proportions of pleasure travel from Canadians (34%) and Americans (66%) than do other northern regions.

One-third of the Canadian trips that go to Northern Ontario are *cottage* trips. Although the visitors might engage in other activities, and use other forms of accommodation, these trips involve at least one night spent at a private cottage or second home.

While it is not surprising that so few *American trips* fall into the peak season "cottage" segment, it is somewhat more surprising that so few *domestic trips* to Canada's Northeast (14%) or Northwest (9%) do so.

The low incidence of *cottaging* by Canadians in these other northern regions could be a function of the way the regions are defined — neither the Northwest nor Northeast is as close to major urban markets that spawn substantial cottage activity — as is Northern Ontario.

Table 13

% Of All Trips To . . . That Are In Private Cottages, Peak Season		
	Canadians	Americans
To . . .	%	%
Northern Ontario	33	8
Northeastern Canada	14	2
Northwestern Canada	9	2

Proportion with any nights in private cottage in peak season.[14]

Rainbow Country is "Cottage Country".

Northern Ontario is not all "cottage country". In fact, cottaging is heavily

concentrated in one of the six tourism regions — Rainbow Country (OTAP 8). Of the 694,000 Canadian overnight cottaging trips to Canada's entire North, about 189,000 (27%) are in Rainbow Country, and a further 266,000 (38%) are in other parts of Northern Ontario.[17]

The prominence of cottaging in this region is not restricted to Canadians. One-fifth of the Americans who visit Rainbow Country in peak season are going to their own vacation homes — a proportion substantively higher than is evident for any other Northern Ontario tourism region.

Canada's Northwest is for camping.

Neither Northern Ontario nor Canada's Northeast is as widely used by Americans or Canadians for camping as is the Northwest part of the country.

Table 14

% Of All Trips To . . . That Are Camping Trips, Peak Season

	Canadians	Americans
To . . .	%	%
Northern Ontario	12	19
Northeastern Canada	12	11
Northwestern Canada	20	32

Proportion with any nights in campground/trailer in peak season.[17]

The prominence of camping in Canada's Northwest may explain the relatively high activity level of this region's visitors. To a greater extent than most other activity groups, *Campers* are "participators".

Perhaps Canada's Northwest is attracting sizeable numbers of American retirees — people with time and inclination to engage in outdoor and cultural experiences as they explore the region and, perhaps, fulfil their dream of travelling the Alaska Highway.

Americans who come to Northern Ontario love to fish!

Though they may not be *camping*, visitors to Northern Ontario are *fishing*. While popular among Canadians (22%), the sport is especially attractive to American visitors (42%).

Table 15

% Of All Trips To . . . That Are Fishing Trips, Peak Season

	Canadians	Americans
To . . .	%	%
Northern Ontario	22	42
Northeastern Canada	14	20
Northwestern Canada	19	19

Proportion with any fishing (CTS) or hunt/fish (ITS) on trip in peak season.[17] Because "peak" season ends before hunting season begins, all Americans who indicated the combined category are presumed to be anglers.

Fishing is considerably more popular among Americans who go to Northern Ontario than it is among their counterparts with a main destination in Canada's Northeast or Northwest.

Americans pay to put a roof (or tent) over their heads . . .

Regardless of which part of Canada's North an American visitor goes to in peak season, he or she is likely to incur accommodation costs. In Northern Ontario, about 8-in-10 trips by Americans rely on some form of paid accommodation. One-quarter of American visitors use motels (24%), and the same proportion use commercial cottages/cabins (27%). Somewhat fewer are hotel guests (17%).

Some regional variation is evident in accommodation choices:

- motels are particularly popular among American visitors in Northeastern Canada (59%);
- commercial cottages or cabins are not widely used in Northwestern Canada (14%), likely because so many of these Americans are camping in Canada's Northwest.

Canadian overnight visitors are not very reliant on the accommodation sector.

Because so many Canadians in Northern Ontario are staying with friends and relatives (26%) or in their own cottages (31%), relatively few use any form of commercial accommodation. Hotels (10%) and motels (11%), likely for business travellers, and campsites (9%) are more popular than are commercial cottages/cabins (5%) among these Canadians.

Cottaging is less prominent in Canada's Northeast and Northwest than it is in Northern Ontario, but those not staying in their vacation homes, are staying with friends and relatives in these other northern regions. Hotels are also quite popular in Northwestern Canada, reflecting the substantial amount of domestic business travel into the region.

Americans and Canadians spend between four and five nights in Northern Ontario.

Average trip length[20] is about the same for Americans (4.6) and Canadians (4.4) in Northern Ontario. Those Americans who go to Canada's Northeast (5.9 nights) or Northwest (5.2) stay somewhat longer. Canadians who go to Northeastern Canada (4.1) and Northwestern Canada (4.2) in peak season spend about as long away from home as do those who go to Northern Ontario (4.4).

Trips of a week or longer are more characteristic of Americans than they are of Canadians in Northern Ontario. About 1-in-5 Canadian trips to the region last six nights or more, whereas more than 1-in-3 American trips do so. Longer stays by Americans undoubtedly reflect the large number of *vacationers* in this market.

American visitors to Canada's Northwest & Northeast have more varied experiences.

Visitors to Canada's Northwest shop, sightsee, go to cultural events, parks or historic sites and zoos, museums, or natural displays at higher rates than do those in Northern Ontario. Going to festivals or fairs is particularly characteristic of trips by Americans to the Northeast, but is not widely done in Northern Ontario in the peak season. (See summary table appended for participation in various activities).

Table 16

Average Number Of "Other" Activities, Peak Season		
	Canadians	Americans
To . . .	%	%
Northern Ontario	1.0	1.9
Northeastern Canada	1.2	3.3
Northwestern Canada	1.2	3.1

Average number of activities on trip, excluding "visit friends/relatives" and "outdoor sports/activities". Includes a visit to a national/regional park. See summary table appended for figures.

The level of engagement in activities across Canada's northern regions can be taken as an indication of the *types of visitors* each attracts and the *availability* of product for visitors to use while they are there. Excluding visiting friends and relatives, and outdoor sporting activities, the average number of "other" activities engaged in by Americans to each region suggests that both the Northeast (3.3) and Northwest (3.1) offer more opportunities for engagement or attract American visitors more willing to visit parks, go to festivals/fairs, sightsee, and the like than does Northern Ontario (1.9).

It costs Americans a lot of money to get to Northern Ontario.

The total cost of a trip to a destination is an indicator of the financial *threshold* that must be overcome for the American or Canadian travel party to decide to make a trip. As is evident in the figures, a Canadian household's decision to take a trip to Northern Ontario is a lot less costly — $260 — than is an American's — $1,175.

In part, the substantial difference in average spending relates to airfares paid by Americans to get to Canada and the comparatively low reliance on paid accommodation and commercial food/beverage sector on the part of Canadians. Use of cottages and other people's homes by many Canadian visitors dramatically decreases their spending on accommodation, restaurants and the like.

Table 17

Average Trip Spending By . . . Visitors, Peak Season		
	Canadians	Americans
To . . .	$	$
Northern Ontario	$260	$1,175
Northeastern Canada	$272	$2,471
Northwestern Canada	$390	$1,691

Total spending, including all transport costs to get to the destination. All figures are reported in Canadian dollars.[21]

The American travel party planning to use commercial accommodation

should expect to spend almost $600 on accommodation for between four and five nights in Northern Ontario (2.7 person party size). Food and beverages and recreation expenses would each require a budget of about $230 for this trip.

Canadian peak season trips to Northern Ontario are "worth more" because they last longer.

The average cost per *shoulder/winter* season overnight trip to Northern Ontario ($186) is considerably lower than is the *peak season* trip ($261). Average "touristic" spending — excluding all transport costs — also reflects differences between the seasons: each *peak season* trip involves $162 in tourism spending whereas the *shoulder/winter season* involves only $113.

These differences disappear when average spending is examined on a per night basis. Because the peak season trip is longer (4.4 nights) than the shoulder/winter trip (3.1 nights), Canadian travel parties to Northern Ontario spend the same amount of money per night — $36.00 on the sum of their accommodation, food/beverages, recreation and shopping — irrespective of *when* they take their trip.

Americans who go to Canada's Northwest spend appreciably more money on recreation and retail than do those destined to Northern Ontario.

Americans who go to Canada's Northwest are "participators". They enjoy the outdoors and go to cultural activities at higher rates than do other Americans in the north. As such, it is not surprising that they spend more money on recreation and shopping. They also experience higher costs to "get to" their destination, largely because, as discussed earlier, many of these Northwestern visitors come from across the continent whereas Northern Ontario's visitor base is more highly concentrated in four bordering states.

Table 18

Americans' Average Spending, Peak Season (Spenders)

	Northern Ontario	Canada's Northeast*	Canada's Northwest
Accommodation	$591	$919	$543
Transport In Canada (Total)	$171	$264	$358
Auto/ Private	$139	$248	$286
Public/ Other	$129	$181	$321
Food & Beverages	$229	$508	$287
Recreation	$236	$400	$449
Retail	$148	$434	$211
Canadian Fares**	$743	$911	$1,166
USA Fares**	$575	$2,291	$1,508

*Interpret with caution because of small base sizes. **To Canada. Figures may not add to total due to rounding. Note: All averages are based on total trips to the destination *that reported spending* in the specific categories. All figures are in Canadian dollars.[2]

Although the figures shown for Canada's Northeast are dramatically higher in most categories than are those for Northern Ontario visitors who spend money on the various items listed, these figures must be interpreted with caution because the base sizes are small.

On a per person/per night basis, Americans with a main destination in Northern Ontario during peak season are spending considerably less ($94) than are their counterparts who visit Northeastern Canada ($161) or the Northwest ($148). If only spending that is related to the "stay" in the region is taken into account — that is, accommodation, food/beverages, recreation and shopping — American visitors to Canada's Northeast ($129/night/person), followed by those in Canada's Northwest ($95/night/person), outspend Northern Ontario visitors ($75/night/ person) by a substantial margin.

Ninety percent of all Americans' trip spending in Northern Ontario takes place between April and September.

Peak season overnight trips by American travel parties to Northern Ontario out-number those in the shoulder/winter season at a rate of about four to one (227,000 in the peak season; 46,000 in the shoulder/winter), but American travel parties *spend* at an even higher rate over the peak period. The average American peak season trip to Northern Ontario costs almost $1,200, but the average cost of a shoulder/winter trip is less than $750.

Table 19

Total Spending On Trips By Americans To Northern Ontario

	Peak Season	Shoulder/ Winter
Total Spending	**$267 Million**	**$32 Million**
Average Spending	**$1,175**	**$734**
Accommodation	$111	$6
Transport In Canada (Total)	$31	$3
Auto/ Private	$20	$2
Public/Other	$11	$1
Food & Beverages	$47	$6
Recreation	$32	$6
Retail	$24	$4
Canadian Fares*	$4	$3
USA Fares*	$19	$4

*To Canada. All figures are in Canadian dollars.

Possibly because of winter conditions, a higher proportion of shoulder/ winter spending by Americans is devoted to *getting to* Canada (commercial carrier fares, 22%) than is the case during the peak season (8%). Accommodation, on the other hand, takes a much bigger bite out of American spending during the peak season (42%) than it does during the shoulder/winter (19%), undoubtedly because the spring/summer trip is a longer one (4.6 nights compared to 3.0 nights in the shoulder/winter).

Spending by Canadians is relatively consistent across Canada's North.

Because so many are staying with friends and relatives or in their own cottages, only a minority of Canadians on trips to Northern Ontario incur costs for shelter and restaurant meals.

Those who *do* purchase accommodation or who have their meals in restaurants spend about the same amount on these items whether in Ontario's North, or Canada's Northeast or Northwest. The high proportion of *business* travel, which is often *airplane* travel, in Canada's Northwest explains the relatively high transport costs, and the relatively low recreation costs for Canadians on these trips.

Table 20

Canadians' Average Spending, Peak Season (Spenders)

	Northern Ontario	Canada's Northeast	Canada's Northwest
Accommodation	$165	$158	$175
Plane, Bus, Boat, Train	$334	$133	$548
Restaurants	$81	$104	$113
Food At Stores	$56	$64	$56
Recreation	$66	$67	$48
Retail	$98	$97	$195

Figures may not add to total due to rounding. Note: All averages are based on total trips to the destination *that reported spending* in the specific categories. All figures are in Canadian dollars.[34]

Activity Profiles: Anglers, Naturalists, Campers & Cottagers

Introduction

Differences in design between the Canadian and International Travel Surveys result in less detailed information on trip activities for the American visitor to Northern Ontario than for the Canadian. In fact, only Anglers — a very important peak season market for Northern Ontario — can be profiled for both major markets. The reader is advised to examine the *Detailed Findings* Report for figures used to develop these profiles.

Anglers

During the six month peak season, Northern Ontario attracts close to

400,000 domestic and American overnight trips that include fishing.[25]

- Three-quarters of these trips are made by Canadians.
- One-quarter are made by Americans.

Fishing is the single most popular outdoor activity among American visitors to Northern Ontario. More than 4-in-10 overnight trips to the region during the peak season involve some fishing — a level of engagement that is quite different from other northern regions of Canada.

Fishing distinguishes Northern Ontario from other northern regions.

Only 2-in-10 American trips to Canada's Northeast or Northwest involve fishing, making fishing a means of differentiating what Northern Ontario has to offer compared to the northern parts of Canada to the east and west of the province.

The domestic Angler market is a very local market . . .

The domestic Angler is quite different from the American Angler in several respects. First of all, the domestic fishing market is very *local*. More than one-half of the Canadian angling trips in Northern Ontario *originate* in the region[26].

- Almost one-fifth of domestic angling trips in Northern Ontario are made by residents of Sudbury.
- One-twelfth are made by residents of Thunder Bay.

These two cities contribute considerably lower proportions of domestic peak season travel in Northern Ontario (Sudbury - 9%; Thunder Bay - 7%).

Torontonians are not keen anglers.

In contrast, the large Toronto market, which contributes 15% of all overnight peak season trips by Canadians to Northern Ontario, only produces 10% of domestic angling trips.

American Anglers resemble the total American market in terms of place of residence.

American anglers come from key feeder states including Michigan, Minnesota, Wisconsin and Ohio in about the same proportions as do Northern Ontario American peak season visitors in general.

Angling is dominated by males.

Regardless of whether the trip is made by an American or a Canadian, there is a clear link between gender and fishing. About 7-in-10 Canadians who fish on their overnight peak season trips in Northern Ontario are

men, and more than 9-in-10 of the American angling trips include at least one man. Only 5-in-10 include at least one woman.

American Anglers are older than Canadians.

Americans in Northern Ontario during the peak season who fish are somewhat older than the corresponding Canadians.

- Almost three-quarters of USA overnight fishing trips in peak season include people 55 years of age or over.

- Fewer than one-quarter of Canadian Anglers are at the older end of the age spectrum.[27]

Domestic Anglers tend to be on "cottage trips" whereas American Anglers are on the classic "fishing trip".

Not only are Canadian Anglers relying on their private cottages for accommodation, and their private vehicles for transportation, but they are also travelling in smaller groups than are Americans.

- Only 1-in-4 Canadian Anglers are accompanied by two *other* household members.

- More than 1-in-3 Americans are in parties of at least three people.

American Anglers are also especially likely to stay in *commercial cottages/cabins* and to use boats and commercial or private planes to get from place to place *within* Canada.

American Anglers spend about a week in Northern Ontario.

On average, American Anglers spend about six nights in Northern Ontario during peak season — somewhat longer than the trip taken by their Canadian counterparts (4.8 nights away from home).

American Anglers "just fish".

For approximately one-quarter of Canadian Anglers in the region, fishing is the only outdoor activity in which they engage while on the trip. In contrast, more than 1-in-2 American Anglers *only* fish.

While Anglers, be they Canadian or American, do not shop; sightsee or visit provincial or national parks to the same extent as other Northern Ontario visitors do, their low participation rates in these activities are likely motivated by different factors:

- The Canadian Angler is likely going from his home in Thunder Bay or Sudbury to his cottage and fishing while he is there.

- The American Angler, on the other hand, is likely going to a

fishing lodge to concentrate on fishing.

The "commercial" nature of the American angling trip costs a lot of money.

The cost of the angling trip for a Canadian is, not surprisingly, appreciably lower than the cost of the same type of trip by an American. The Canadian is relying on transportation by his own car to a location relatively close to home, shelter at his own vacation property, use of his own boat, and meals prepared in his own cottage kitchen. On average, this trip costs a Canadian household about $170 for almost five nights.

In contrast, the American Angler is relying on paid accommodation, at either a commercial cabin or camp ground, a rented boat and/or fly-in costs, restaurant meals, and the costs of "getting to Canada". The American Angler trip costs an average of $1,445.

When *all* transportation costs are excluded, the fishing trip to Northern Ontario will cost the American travel party almost $1,225 for about six nights.

The Angling trip is not necessarily the most expensive for American visitors.

The American fishing trip is considerably more expensive for the travel party than is a trip that takes Americans to parks or historic sites ($838) or the one that utilizes none of Northern Ontario's natural environment (Non-Participants - $589) because it lasts longer and involves more people.

On a per person, per night basis, however, the most expensive American trip to Northern Ontario is the one that uses none of the natural resources available in the region. This "Non-Participant" trip costs about $82 per person per night, whereas a fishing trip costs about $68.

Canadian Naturalists

125,000 Canadian households are *Naturalists* — households that visit Northern Ontario in the peak season and take walks, hike, and view birds or wildlife.[28] This is an important activity sector for Northern Ontario for three reasons:

- Naturalist activities appeal to both men and women, providing the region with a marketing option that is not as heavily concentrated in one half — the male half — of the population;

- Naturalist trips are particularly attractive trips to the large and potentially lucrative Toronto market;

- Because they are not fishing trips, Naturalist trips provide touristic activity for other tourism infrastructure in Northern Ontario, including festivals, fairs, cultural performances, and aboriginal cultural activities.

Naturalists are city folks . . .

Naturalists are particularly likely to be residents of Southern Ontario and to be "city folks". In fact, almost one-fifth (19%) live in Toronto — a city that provides Northern Ontario with only 1-in-10 Anglers in peak season.

Like Canadian Anglers, Canadian Naturalists are often "cottagers" (49%), but they also tend to be campers (43%).

Typical "tourists"

The activity profile of Naturalists suggests a group of Canadians "on holiday" in Northern Ontario. They are more apt to sightsee, shop and go to cultural performances and zoos or natural exhibits than are most other activity groups, and than is the visitor population at large.

Naturalists are also "heavy users" of non-consumptive outdoor resources in Northern Ontario: more than 4-in-10 of them participate in at least four outdoor activities *other than* hunting or fishing while on their trip.

Part of the reason Naturalists seem to fit so many activities into their trip to Northern Ontario is that they stay longer than do other activity groups. On average, this Canadian household spends almost seven nights away from home — compared to the peak season average for all Canadians of about four nights.

Enjoying nature is "gender neutral"

Naturalists are as apt to be men as they are to be women. This gender-neutral profile is characteristic of the households that visit Northern Ontario over the peak season, but differs substantively from the more *consumptive users* of the natural environment — Anglers.

Because they stay longer, Canadian Naturalists spend more money.

The average Naturalist trip to Northern Ontario by a Canadian household in peak season costs the household about $272 — a considerably larger sum than that spent by domestic Anglers ($170) but on par with the domestic average ($261).

American "Park Visitors"

About 82,000 American trips to Northern Ontario in peak season include some time spent in national, provincial or regional parks or stops at historic sites. More than one-

quarter of these trips are made by Michigan residents and about one-fifth are made by residents of Ohio.

American park visitors are pleasure travellers.

Almost all Park Visitors are on pleasure trips (90%) and a sizeable minority — about one-fifth — seem to be on bus tours. They use a bus to enter and travel through Northern Ontario.

They are not necessarily campers.

Although they visit parks or historic sites, this segment is not particularly likely to camp. One-third use hotels in Northern Ontario and one-quarter rely on motels for their four nights of northern accommodation.

Women and younger people visit parks . . .

More women are apt to be found on a Park Visit trip (67%) than on an Angler trip (49%) to Northern Ontario. These Americans are also more likely to have children along on the trip, and to represent a somewhat younger stage in the life cycle than do Anglers.

American "Non-Participants"

The 49,000 American trips to Northern Ontario in peak season that seem to remain detached from the outdoor activities available within the region are, for the most part, on pleasure trips. Like their Park Visitor colleagues, a significant minority of these Non-Participants also seem to be on a bus trip.

Their trips are shorter than are those of Park Visitors or Anglers, and they are especially likely to utilise *motels* for accommodation (49%). To a greater extent than Anglers and Park Visitors, Non-Participants are also likely to be found in the homes of their friends or relatives.

Since more Non-Participants take their trip *in order to* visit friends and relatives than is the case for the other activity groups, it is not surprising that more of them are billeted in these homes.

Canadian Campers

Canadian Campers — those who spend any nights in camping facilities in the north — include some Naturalists and some Anglers.

Campers take advantage of the great outdoors.

They use Northern Ontario's natural environment more intensively than does any other group. Of the 162,000 domestic camping households in the region during the peak season, over 1-in-3 engage in four or more outdoor

activities. They display a particular enthusiasm for sightseeing, swimming, fishing, walking and hiking, bird and wildlife viewing and other outdoor activities. Fewer than 1-in-10 Campers claim to have engaged in *no* outdoor activities.

Only about one-third of Canadian Campers visit national or provincial parks while on their trip and about one-quarter utilize a form of commercial accommodation in addition to a campground or trailer on their Northern Ontario trip.

Camping is worth travelling for . . .

Canadian Campers travel a comparatively long distance to reach their destination (416 kms), consistent with the fact that the majority live in *Southern Ontario.* About one-tenth live in Toronto and one-twentieth live in Kitchener/Waterloo.[29] Winnipeg is also a substantive source for Campers in Northern Ontario: 1-in-20 Canadian households that spend nights camping live in this Manitoba city.

Unlike Anglers, Campers tend to be young.

Campers include a higher proportion of young people — 15 to 24 years of age — and a lower proportion of older Canadians than does any other activity group. The relative youth of this segment likely explains why such a high proportion of them have no more than a secondary school education and few have yet to graduate from university. The comparatively low levels of formal education are not reflected in household incomes — a fact that suggests that the young people who camp reside in a parental home and may be continuing their education.

Canadian Cottagers

Canadian Cottagers are those households that spend at least one night on their trip to Northern Ontario in their own private cottage or second home.

Cottagers don't travel very far or spend very much but they are a major source of touristic activity in the region.

Even though they travel a relatively short distance to reach their Northern Ontario destination (257 kms), spend the least ($132) on the trip, and rely almost exclusively on the cottage for their shelter during the trip, Canadian Cottagers constitute a very substantive portion of peak season tourism in the region. Almost one-half million Canadian households visit their cottages in Northern Ontario during the peak season (455,000).

Life by the lake . . .

Cottagers' activity profile is suggestive of *lakefront* living: they swim, fish,

and participate in other water-based activities but are not especially likely to be found sightseeing, walking or hiking. Fewer than 2-in-10 Cottagers engage in more than four different outdoor activities on their peak season Northern Ontario trip.

Many Cottagers are locals . .

One of the reasons their travel distance is comparatively short is that half of Cottagers in Northern Ontario live in the region, and a further eighth live in Winnipeg. In fact, three 'northern' cities generate more than one-third of the domestic Cottager segment: Sudbury (13%), Thunder Bay (11%) and Winnipeg (12%).

Regional Profiles: Canadians & Americans

Introduction

In the following paragraphs, activity profiles within the domestic and USA markets are presented for each of the six tourism regions (OTAPs) that constitute Northern Ontario. The profiles are presented separately for Canadians and Americans who visit the six regions because they represent very different markets. For more details about these regional profiles, the reader should consult the *Detailed Findings* volume.

As differences in domestic and USA utilization of each Northern Ontario tourism region are detailed in the following paragraphs, it becomes clear that the province's "north" may constitute an *administrative unit*, but it is not a *destination unit* for Canadian or American overnight visitors in peak season.

Canadian Peak Season Visitors

- Near North (OTAP 7)

Trips to Near North by Canadian households in peak season are characterised by their "outdoors" orientation. Likely because much of Algonquin Park is in this region, trips are more likely than is the case in other tourism regions of Northern Ontario to include a visit to a national or provincial park, bird and wildlife viewing, hiking or walking. Only about 1-in-3 Canadian overnight visits to Near North involve *no* outdoor activities. While not widely enjoyed, golfing is more popular here than in most other Northern Ontario tourism regions.

- Rainbow Country (OTAP 8)

Cottagers are particularly prevalent among Canadian households that take an overnight trip to Rainbow Country in the peak season. Because cottages are often situated on lake frontage, there is especially widespread participation in swimming and other water-based activities in this portion of Northern Ontario. Golfing is more prominent among outdoor activities among Canadian visitors to this region than to most others.

- Algoma Country (OTAP 9)

Canadian overnight visitors to Algoma Country are *less* likely than visitors to any other Northern Ontario region to participate in outdoor activities — 7-in-10 participate in none. Visitors to this region are also comparatively unlikely to spend nights in campgrounds or in private cottages, perhaps because they come to the region for business or personal business reasons at a higher rate than is evident for other parts of Northern Ontario (fewer than 4-in-10 trips to this region are made for pleasure reasons).

Since neither pleasure travellers nor cottagers/campers are prevalent among Canadian overnight visitors to Algoma Country, it is not surprising that relatively few of the visits include fishing, swimming or other water-based sports as activities.

- James Bay Frontier (OTAP 10)

James Bay Frontier is very similar to its neighbour — Algoma Country — in the comparatively low level of interaction with the outdoors by Canadian visitors in the peak season. Two-thirds of these visitors participate in *no* outdoor sports or activities on the trip that brought them to the region. They, like their counterparts who took trips to Algoma Country, are especially *unlikely* to have gone swimming, participated in other water-based activities, or gone fishing.

- North of Superior (OTAP 11)

Because it includes a major urban centre — Thunder Bay — it is not surprising that North of Superior captures a blend of "outdoor" and "urban" activities. Fishing is quite popular among Canadians who take an overnight trip to the tourism region in the peak season, although swimming and other water-based sports are not as widely enjoyed here as they are in Near North or Rainbow Country to the south; or Sunset Country to the west.

Restaurant dining is particularly common on trips to North of Superior but shopping is relatively uncommon. Both of these activity participation rates may reflect the

sizeable proportion of *business* trips destined to the region — 1-in-4 trips by Canadians to this region in the peak season are made primarily for business purposes.

- Sunset Country (OTAP 12)

Relatively few Canadians go to Sunset Country to visit friends and relatives but about one-quarter of these visitors take an overnight trip to this Northern Ontario region for business purposes. The prominence of the business traveller may explain the comparatively low level of shopping and sightseeing in the region. At the same time, the sizeable inflow of Manitoba cottagers and other pleasure visitors to Sunset Country from Manitoba[30] and other parts of Canada may explain why levels of participation in sports and outdoor activities are on par with Northern Ontario as a whole.

American Peak Season Visitors

- Near North (OTAP 7)

Trips to Near North by American travel parties in peak season are characterised by their "camping" and water-oriented nature. Americans who go to this region in the peak period are particularly likely to be campers and/or to visit parks or historic sites — possibly because Algonquin Park is located here.

To a greater extent than is evident in other Northern Ontario regions, these visitors swim and participate in other water sports. They are also apt to fish, but at a lower intensity than is evident among American visitors to other Northern Ontario regions such as Rainbow Country (OTAP 8) or Sunset Country (OTAP 12).

Possibly because of the presence of a major provincial park within the region's boundaries, Americans in Near North are especially likely to visit a zoo/museum/natural display while on their trip, although such activities, along with attendance at cultural and sports events may take place in nearby municipalities — either within the region such as North Bay, or near the region such as Ottawa.

- Rainbow Country (OTAP 8)

Shoppers, sightseers, anglers and cottagers are particularly prevalent among American travel parties that take an overnight trip to Rainbow Country in the peak season. In fact, one-fifth of these USA visitors spend nights in their own cottages — a pattern of accommodation within the region that resembles the one evident for Canadians who go to Rainbow Country on overnight trips — cottagers are especially prominent among the domestic visitors to this region. Camping, however, is relatively uncommon among American visitors to the area.

Like their neighbours in Near North, American visitors to Rainbow Country are especially apt to swim, but are more likely to fish than are those visiting the region to the east (OTAP 7).

- Algoma Country (OTAP 9)

Shoppers, sightseers, park or historic site visitors predominate among American overnight visitors to Algoma Country. Despite the presence of a major urban centre in the region — Sault Ste. Marie — American visitors are not inclined to attend festivals or fairs, go to cultural or sports events, or theme parks. Almost all overnight USA visitors are in Algoma Country on a pleasure trip, but they seem to have a relatively low "engagement" rate in the activities measured in the International Travel Survey. For example, 1-in-2 participate in only one outdoor activity, and a further 1-in-4 participate in none.

- James Bay Frontier (OTAP 10)

The base size for James Bay Frontier is too small to warrant separate examination.

- North of Superior (OTAP 11)

Sightseeing and taking in parks or historic sites are the most widely noted activities by American visitors to North of Superior. Relatively few Americans visit friends or relatives while on an overnight trip to the region. About one-quarter spend nights camping, and fewer than one-third go fishing while on the trip.

- Sunset Country (OTAP 12)

Relatively few Americans go to Sunset Country to do anything but fish! Fully 8-in-10 of these USA residents fish while in the region, and 1-in-2 *only* fish. Shopping, sightseeing, visiting parks or historic sites and the like seem to pale against the appeal of fishing in this region. It should be noted that one-half of these Americans are staying in commercial cottages or cabins while in Sunset Country and visitors to this region are more apt than any others to rely on air or boat transport while within Canada.

These findings suggest that, to a greater extent than other Northern Ontario tourism regions, Sunset Country is attracting the "fly-in" Angler market — people who spend their nights in Northern Ontario in a remote location, and their days on the lakes and rivers of the region with a fishing pole in their hands.[31]

Observations & Market Opportunities

Introduction

Not only are American peak season visitors to Ontario's North different from their domestic counterparts in very significant ways, but Northern Ontario emerges as a patchwork of very different types of tourism activities from region to region. For example, visitors to Algoma and James Bay Frontier have relatively little engagement with the outdoors. Rainbow Country supports considerable cottaging, but not much other touristic activity. Sunset Country draws Canadians to visit friends and relatives and, because of Thunder Bay, to conduct business, but it draws Americans for fishing.

Regardless of region, peak season participation in cultural tourism, fairs and festivals and the like is relatively scarce in Northern Ontario. Low utilization levels of these types of attractions may reflect the preferences of visitors or they may reflect the lack of suitable opportunities and/or marketing of other types of activities.

In the following section, some suggestions for ways of diversifying and/or extending the appeal of Northern Ontario for Canadians and Ameri cans are presented. These suggestions derive from the profiles of visitors that are currently travelling within Canada — be they Americans or Canadians. The list is, by no means, exhaustive, but is provided as a way of encouraging tourism businesses and planners for Northern Ontario to draw out implications from the *Northern Travellers' Profile.*

Increasing the appeal of Northern Ontario among women

An appeal to the *Naturalist* segment with its interest in hiking, bird and animal viewing, and non-consumptive use of the environment could increase utilization of Northern Ontario by women and a more upscale market.

Encouraging camping in Northern Ontario might provide the "next generation" with enthusiasm for the northern experience.

Camping is a family-oriented activity and one that brings younger visitors to the north. As such, it is an obvious route to giving younger Canadians and Americans a first, and hopefully, lasting taste for "the north". Support for camping not only would bring Northern Ontario the most "active" visitor group, but it would also be an investment in the future.

Reaching out to younger anglers could also be important.

It may be prudent to monitor the age of anglers, and particularly American anglers who come to Northern Ontario. This group is currently concentrated at the older end of the age spectrum. Such a concentration could be a reflection of the stage in the life cycle when people can afford the time and money required to take a "fishing trip" into the north.

Will younger people "graduate" to angler status as they age? If so, the ageing baby boomer bulge in the population should be good for fishing in Northern Ontario.

If, on the other hand, the upcoming "older generation" is not as enthusiastic about fishing as is the current one, steps may have to be taken to entice younger people into the sport, and/or to examine the types of fishing products that are available in Northern Ontario to determine whether they are meeting the needs and interests of younger potential visitors.

Anglers and Park Visitors help spread tourism demand into the spring shoulder season.

A sizeable minority — 4-in-10 — peak season American trips to Northern Ontario that include fishing are made during April, May and June, suggesting that operators in the north enjoy a spread in demand over the spring and summer quarters. Similarly, peak season Park Visitors, while concentrated in July, August and September, also come to Northern Ontario during the spring.

Oddly, those who participate in no outdoor activities while on their trip tend to be concentrated in the "peak" of the peak season: July, August, September. To free space in the region's commercial accommodation, and most particularly in *motels*, efforts might be directed to those who do *not* rely on the North's outdoor resources to travel earlier (or later) in the year.

Look southward . . . they're coming to Ontario . . . . but they don't reach the North.

At present, it is rare for an American travel party that has a destination in Southern Ontario to venture into the northern region of the province for a night or more. Fewer than 1-in-100 Americans with a main destination in the southern part of the province during peak season extend their trip into Northern Ontario.[32]

Southern Ontario visitors do not have to be "sold" on Canada or Ontario — they have already made the decision to cross the border. What would it take to entice these visitor to cross the boundary between southern and northern Ontario?

Give Southern Ontario hosts a reason to bring their guests to Northern Ontario.

Major population centres in Southern Ontario not only attract considerably more business travel than does the more sparsely populated and less urbanized North, but they also attract a higher proportion of Americans who come to visit friends and relatives than does the North.

While it is unrealistic to think that friends and relatives who live in Southern Ontario would *move* so that their American visitors could spend time in Northern Ontario, it is not unrealistic to consider *hosting incentives* for Southern Ontarians. Hosts in Southern Ontario might be encouraged to *bring* their American visitors to Northern Ontario. Not only would a hosting program increase visitation by Americans, but it would also bring more Southern Ontarians into the north.

The "outdoors" may not sell the North to many Southern Ontario visitors.

Since half the American overnight visitors to Southern Ontario do not participate in *any* outdoor activities, experiencing the outdoors and natural settings may not be sufficiently attractive to convince the "short-stay" USA visitors to venture North. Options, such as a North/South experience that combines theatre in Toronto or Stratford with a bus tour of Northern Ontario's autumn colours, or packaging/marketing northern cultural events with analogous events or performances in Southern Ontario might be considered.

The New York market should be examined.

New York residents represent fewer than 1-in-100 peak season trips to Northern Ontario, but represent the single largest *feeder state* for Southern Ontario.

While relatively few New Yorkers go to Northern Ontario, those who do show a special interest in camping. Furthermore, one-fifth of all New Yorkers with a main destination in Southern Ontario during peak season, or about 85,000, visit a park or historic site on their trip.

Perhaps combination packages could be developed to attract some of the 184,000 New York travel parties that are currently visiting Ontario South and participating in at least one outdoor activity.[33] Could these folks be enticed to Algonquin, Killarney, Lake Superior, Quetico or Pukaskwa by packaging a northern and southern park experience together?

While Quebec is a major source of domestic tourism for Southern Ontario, it has its "own" North.

Quebec residents represent the single largest domestic market for Southern Ontario (excluding Ontario itself). Unlike New Yorkers, however, these visitors have their "own" north to explore and are, therefore, not as promising a market for Northern Ontario as are New Yorkers.

The American small conventions market . . .

Currently, Ontario as a whole captures almost 60% of peak season American visitors who come to Canada on an overnight trip sparked by a *convention, conference, trade show, or seminar.*[34] Of the 109,000 American travel-trade trips that arrive in Ontario in peak season, 97% are destined to a location in Southern Ontario (106,000) while only three percent (3,000) are coming to Northern Ontario.

The northern part of the province may not be in a position to compete with centres such as Toronto, Hamilton, and Ottawa for very large conferences or conventions, but it might ensure that it is doing all that is possible within key feeder states (e.g., Michigan, Wisconsin, Minnesota) to entice smaller seminars and conferences during the "tails" of the peak season.

Canadian (or American) Non-Business Conferences

Northern Ontario attracts a relatively high proportion of *non-business* convention tourism such as clubs, service organizations, religious organizations, and sports tournaments. While this form of travel is considered to be "pleasure" travel, it represents a niche opportunity for tourism in Northern Ontario within the domestic and, possibly, the USA market.

Of the 60,000 Canadian households who take a non-business convention trip in the peak season to a location anywhere in Ontario, almost one-fifth are going to Northern Ontario. At present, all these Canadians *live* in Northern Ontario.[35] Efforts to expand this market by drawing on clubs, service, sports and religions organizations from Southern Ontario and key border states might be worth considering.

Incremental niche market gains

Northern Ontario can implement marketing tactics to expand its reach within the niche markets that currently support tourism in the region, but most of these market segments are relatively small. *Success* within such markets will, therefore, provide only modest increases in tourism activity in the region.

The niche marketing approach has considerable merit and might require

greater product diversification and up-grading of existing accommodation and transportation facilities to provide visitors with a stronger belief that they are getting value for their tourism dollar in Northern Ontario.

Creating a "dream" in Northern Ontario

Simultaneous to diversifying and up-grading, serious consideration might be given to creation of a totally new and different reason for Canadians, Americans and overseas visitors to "go north" than they have had. Americans may dream of travelling the Alaska highway — and many get there; children dream of going to Disneyworld — and many a family finds its way to Florida. What major attraction could be developed that would excite visitors' imagination about Ontario's North?

Whether it is associated with existing tourism products in the region, such as fishing or other resource-based activity, takes on an aboriginal theme, or uses some wholly new core idea, the "dream" has to be sufficiently powerful to entice visitors to incur the relatively high costs of "getting there". As tourism in Northwestern Canada shows, if the dream is strong enough, people will pay to reach it.

The "dream" has to offer a variety of experiences to ensure broad-based appeal: cultural and natural components; rugged and easy options for experiencing Northern Ontario. It should also have high end and moderate dining and accommodation facilities for campers and lodge guests — the people who are willing to pay to reach the dream are also willing to pay for high quality amenities while they experience it. And, of course, people need a way to get to this dream . . . transportation must be made as direct and easy as possible.

Notes & Map Of Northern Regions

[1] The Canadian Travel Survey and the International Travel Survey, both undertaken by Statistics Canada, are very different types of studies. The CTS is a telephone survey of a representative sample of approximately 117,000 Canadian households over the course of one year. It relies on twelve independent monthly samples of Canadian households, each asked about travel during a specified one month time period. The ITS, on the other hand, is a self-completion survey distributed to a sample of visitors from the USA and Overseas who enter Canada throughout a calendar year. Those respondents who complete the questionnaire are reporting on a single trip to Canada. Each study brings with it different levels of precision, different strengths and weaknesses, different definitions and units of measurement. In the interests of extracting the most useful *profile* information from the two surveys, the author has taken some liberties in the presentation of material within this report, using, for example, "visitors" as a common term for both studies, even though it has a different technical meaning within the ITS and CTS.

This is *exploratory* research — the author could not predict in advance what would emerge as salient or useful, stable or reliable information. It is also *transformational* research — it has transformed Statistics Canada surveys — conducted with one set of objectives — into meaningful analysis to address completely different objectives. The extent to which Ontario's tourism industry can benefit from the marketing-oriented profiles provided herein is the extent to which the techniques applied to extract information is a cost effective, pragmatic use of research. Although considerable information on Northern Ontario's visitors is provided in this report, even more information is contained in the Detailed Findings. Readers are encouraged to pursue topics of interest in greater depth by exploring the main analytical report, provided under separate cover.

[2] Definitions for northern regions were specified by MEDTT, as follows: ONTARIO Tourism Regions 07/12; NORTHEAST Newfoundland Tourism Regions 04,05; Quebec Tourism Regions 18, 17 16,15,14, 02; NORTHWEST Manitoba Tourism Region 08; Saskatchewan Tourism Region 07; Alberta Tourism Regions 08, 13, 14 excluding Census Division 11; Tourism Region 06 excluding Census Division 10; British Columbia Tourism Regions 06, 07, 08; Northwest Territories; Yukon.

[3] A six month "peak" season was adopted for the following reasons: (1) The World Tourism Organization definitions of tourism were adopted throughout this analysis — which means that business trips, visits to friends and relatives and holiday or vacation travel are all included and some of these trip types are not as weather-dependent as others; (2) the incredible size and diversity of tourism activity in Northern Ontario requires that activity in the "southern end" of the North and the "northern end" be accommodated; and (3) the limitations of the information available within the two studies used in this project. The ITS does not permit analysis of units smaller than a calendar quarter because of the weighting system used by Statistics Canada. Third quarter was considered as an appropriate "peak" season, but the sample sizes were too small to permit the detailed assessment demanded by the project.

[4] This does not include nights spent in the region on trips with a main destination in some other part of Canada. Main destination is defined as follows: more than 50% of the nights spent on the trip were spent in one of the six analytical units: Northern Ontario; Southern Ontario; Northeastern Canada; Southeastern Canada; Northwestern Canada; Northeastern Canada.

[5] *Canada's North* is the sum of Northern Ontario, Northeast and Northwest.

[6] Source: CTS'94 Micro Data File; ITS-USA'94 Micro Data File; ITS-Overseas'94 Micro Data File.

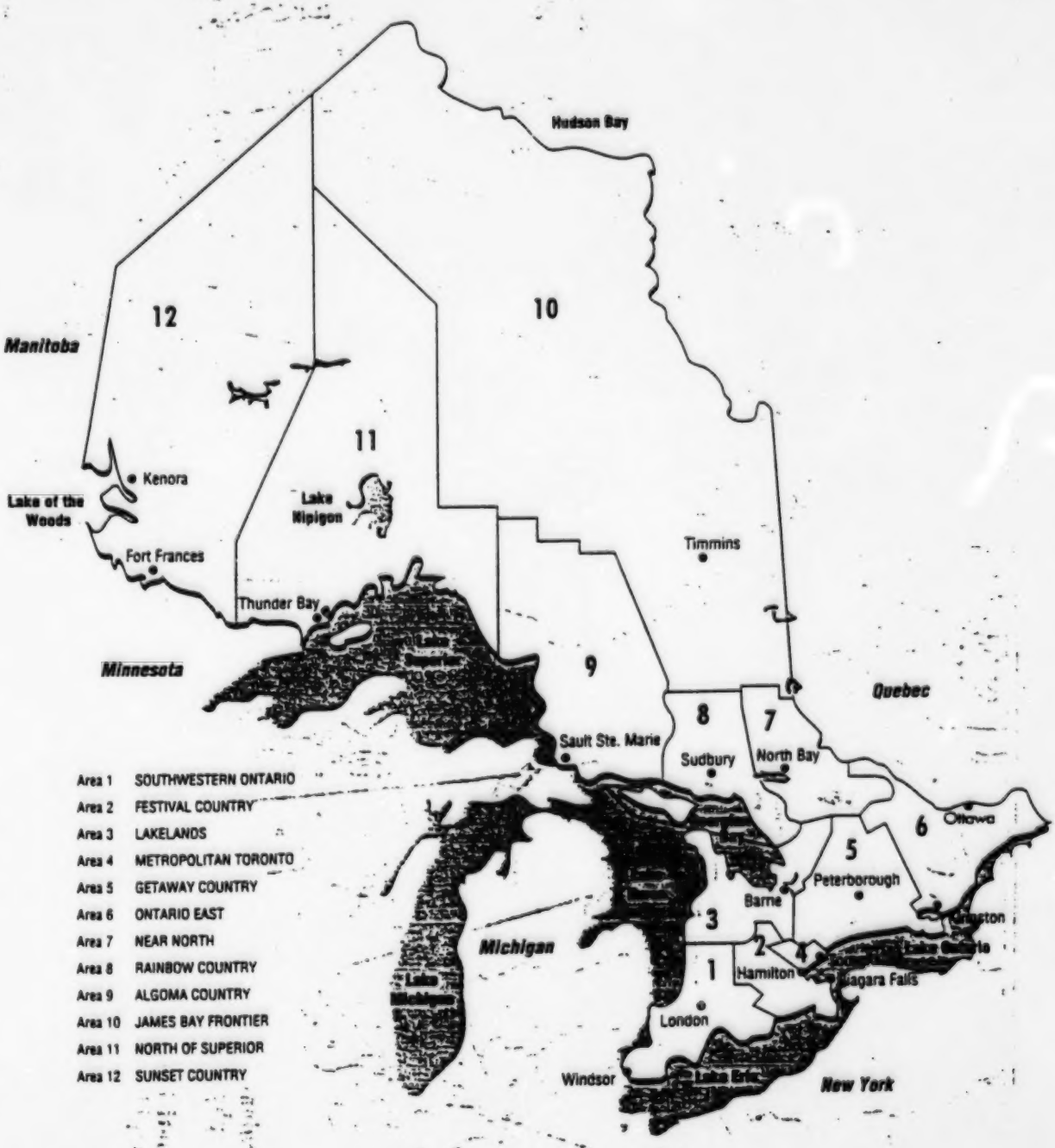
[7] Source: CTS'94 Micro Data File; ITS-USA'94 Micro Data File.

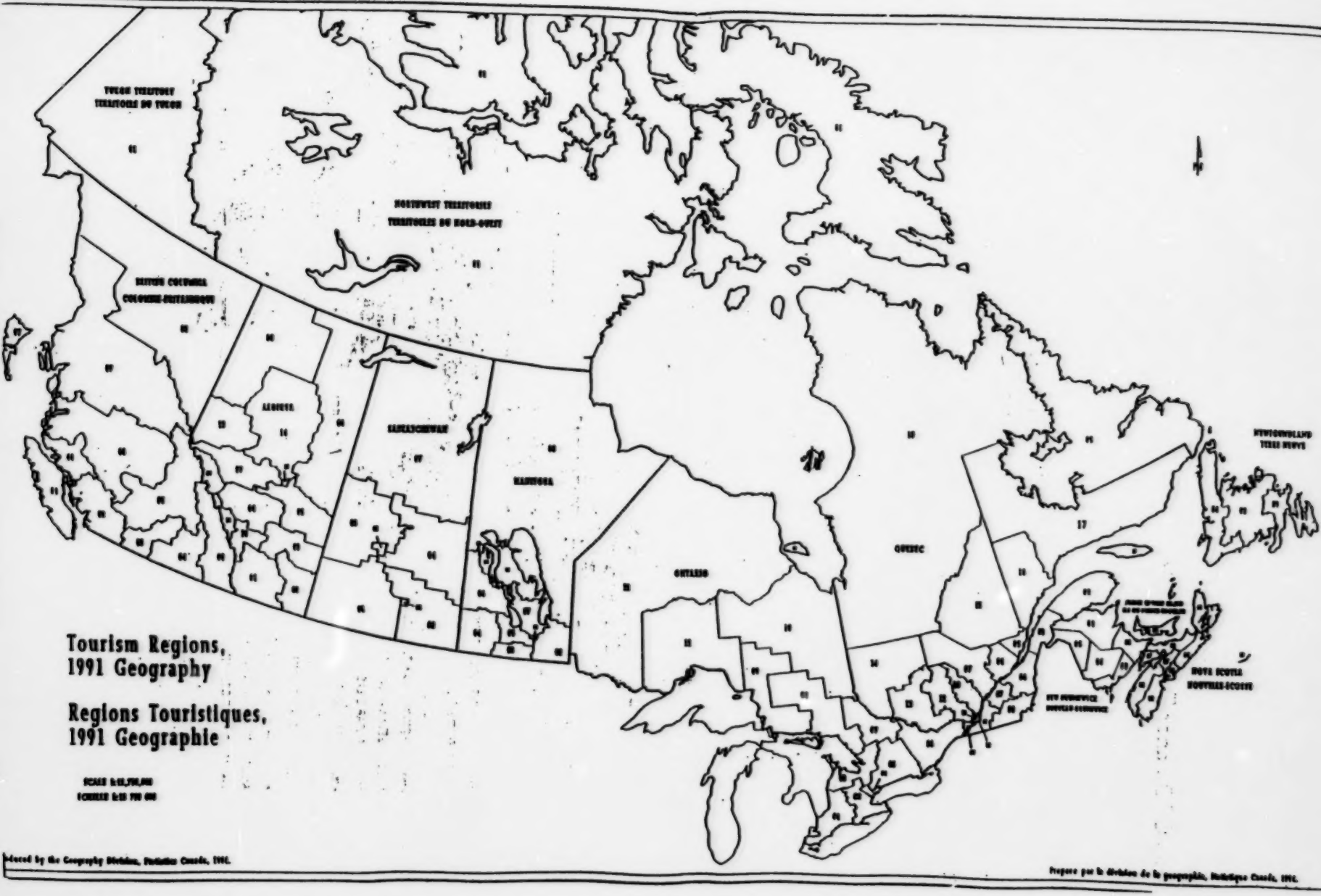
[8] Source: CTS'94 Micro Data File.

[9] Source: ITS'94 Micro Data File.

[10] Source: CTS'94 Micro Data File; ITS-USA'94 Micro Data File; ITS-Overseas'94 Micro Data File.
[11] Source: CTS'94 Micro Data File. Note: all cities are the corresponding census metropolitan areas (CMA).
[12] Source: CTS'94 Micro Data File.
[13] Note: In the CTS, gender and age are reported for the designated respondent who must be at least 15 years of age. Figures shown do not include characteristics of other members of the household travel party. In the ITS, respondents report the gender and age of *all* members of the travel party. For this reason, the figures are not directly comparable, and should be interpreted with caution. Source: CTS'94 Micro Data File; ITS-USA'94 Micro Data File.
[14] Adults are defined as individuals 15 years of age or older.
[15] Source: CTS'94 Micro Data File; ITS-USA'94 Micro Data File.
[16] Source: CTS'94 Micro Data File; ITS-USA'94 Micro Data File.
[17] Source: CTS'94-USA Micro Data File.
[18] Source: CTS'94 Micro Data File; ITS-USA'94 Micro Data File.
[19] Source: CTS'94 Micro Data File; ITS-USA'94 Micro Data File.
[20] For Canadians, trip length is number of nights away from home since nights cannot be assigned to a particular region; for Americans, trip length is the number of nights *in the region.*
[21] Source: CTS'94 Micro Data File; ITS-USA'94 Micro Data File.
[22] Source: ITS-USA'94 Micro Data File.
[23] Source: ITS-USA'94 Micro Data File.
[24] Source: CTS-USA'94 Micro Data File.
[25] In the ITS questionnaire, the category is "hunting/fishing", but because of the months covered by the "peak season" all of these have been assumed to include at least some fishing. In the CTS, "fishing" and "hunting" are distinct categories but have been combined for analytical purposes.
[26] Source: CTS'94-USA Micro Data File.
[27] Source: CTS'94-USA Micro Data File.
[28] Source: CTS'94 Micro Data File.
[29] Source: CTS'94 Micro Data File.
[30] Source: CTS'94 Micro Data File
[31] Source: ITS-USA'94 Micro Data File.
[32] Source: ITS'94-USA Micro Data File.
[33] Source: ITS'94-USA Micro Data File.
[34] Source: ITS'94-USA Micro Data File
[35] Source: CTS'94-USA Micro Data File.

Map Of Ontario's Travel Regions





Produced by the Geography Division, Statistics Canada, 1991.

Preparé par la division de la geographie, Statistique Canada, 1991.

Appendix Table 1

Activities Engaged In By Canadians During Peak Season, 1994

	Destination					
	Ontario			Other Canadian Northern Regions		Canada's North
Overnight Household Trips (15+)	North	South	Total	East	West	Total
Unweighted	842	3,817	4,659	1,201	869	2,912
Weighted (000's)	1,365	9,428	10,793	1,077	961	3,403
	%	%	%	%	%	%
Any Visit Friends/Relatives	60	63	62	56	55	57
Only Visit Friends/Relatives	17	21	20	18	19	18
Shop	27	28	27	25	20	24
Sightsee	26	22	23	28	29	27
Festival/Fair	3	6	6	6	6	5
Cultural Performance	1	4	3	6	2	3
Aboriginal Cultural Activity	1	1	1	1	2	1
Sports Event	4	6	6	3	5	4
Museum/Art Gallery	3	4	4	7	5	5
Zoo/Natural Exhibit	4	3	3	12	3	6
Theme Park	1	3	2	4	2	2
National/Provincial Park	8	6	6	12	9	10
Historic Site	3	4	4	11	6	7
Nightlife/Entertainment	8	10	10	15	13	12
High Quality Restaurant	11	15	14	17	13	14
Any Camping (Nights)	12	10	11	12	20	14
Any Private Cottage (Nights)	33	20	22	14	9	20
No Outdoor Sports/Activities[1]	50	60	59	55	55	53
Any Outdoor Sports/Activities[1]	50	40	41	45	45	47
Business (Main Purpose)	14	13	13	9	28	16

Figures may not add to 100% because of multiple responses. [1] Includes any visits to national/provincial park, any camping nights, and all outdoor sports activities listed in questionnaire. Source: CTS'94, Statistics Canada Micro Data File.

Appendix Table 2

Activities Engaged In By Americans During Peak Season, 1994

	Destination					
	Ontario			Other Canadian Northern Regions		Canada's North
Overnight Party Trips	North	South	Total	East	West	Total
Unweighted	846	4,891	5,737	72[1]	374	1,292
Weighted (000's)	227	1,711	1,938	23	119	349
	%	%	%	%	%	%
Visit Friends/Relatives	24	30	29	15	21	22
Shop	46	58	57	56	60	51
Sightsee	50	54	54	76	66	57
Festival/Fair	3	7	7	34	8	6
Cultural Event	4	18	16	-	14	7
Sports Event	4	7	7	2	6	5
Zoo/Museum/Natural Display	11	18	17	41	30	19
Theme Park	2	5	5	1	3	2
National/Provincial/Regional Park/Historic Site	36	27	28	61	59	45
Nightlife/Entertainment	13	19	18	11	30	18
High Quality Restaurant	20	41	39	46	30	25
No Outdoor Sports/Activities[1]	22	55	51	12	23	21
Any Outdoor Sports/Activities[1]	78	45	49	88	77	79

[1]Caution: small base size. Figures may not add to 100% because of multiple responses . [1] Includes any trips to national/provincial/regional park/historic site, any camping nights, and all outdoor sports activities listed in questionnaire. Source: ITS-USA'94 Statistics Canada Micro Data File